



**Institute for Social Entrepreneurship**  
Pursuing the Greatest Opportunity

**Profile – Institute for Social Entrepreneurship**

**for**

**BUSINESSES, SOCIAL VENTURES,**  
**DEVELOPERS & COMMUNITIES**

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## Introduction and Background

### The Mission

The Institute for Social Entrepreneurship's mission is to develop Social Entrepreneurial Concepts, Programs and Individuals. This is accomplished through our research, design and implementation of initiatives and programs that train individuals and organizations.

### What is a Social Entrepreneur?

In a nutshell, a Social Entrepreneur is a person who is attuned to both business and the big picture; who applies his or her business expertise to create social value; and who provides smart solutions to business and community problems by thinking like an entrepreneur. Traditionally, entrepreneurs have trained their focus on products, services and profits. At ISE, we know entrepreneurs can do more—and are often expected to. Above and beyond business “as usual,” they leverage their skills and resources to address serious needs, expand their impact and bolster the communities, neighborhoods, schools and services in the places they do business.

### The Institute's Expertise

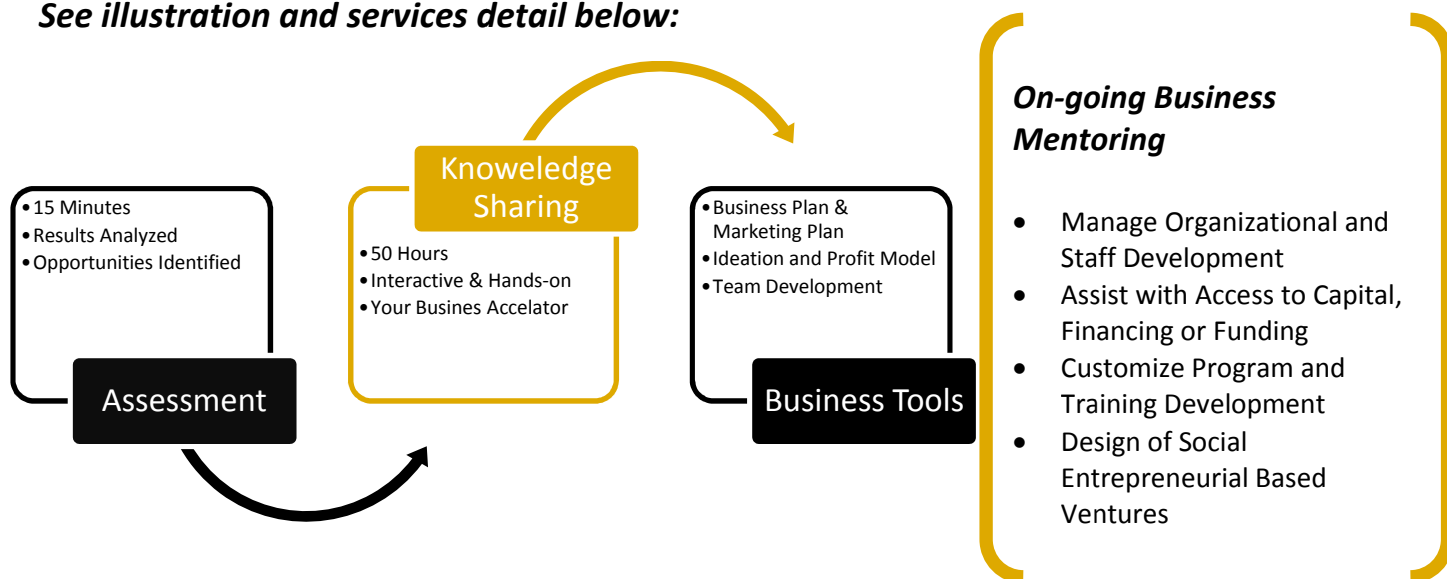
- Demonstrate and model the concept of Social Entrepreneurship
- Provide unique curriculum and educational experiences designed to integrate Social Entrepreneurship in classrooms, businesses and communities
- Provide assessment, quality training, expert consultation and business services

### Services

The Institute utilizes a social entrepreneurial framework to train individuals, owners, businesses and organizations through a uniquely designed curriculum, training and consulting process. The services and products consist of:

- **Assessment**
- **Business Tools**
- **Knowledge Sharing**
- **Special Projects**

*See illustration and services detail below:*



## The New Economy and Challenges for All Sectors

As the US economy searches for solutions to the growing trade deficit, inflation, lack of access to capital, increase layoffs and slower economic growth, there appears to be a need to redefine or alter our current economic approaches. The “New Economy” or approach will continue the economic growth fueled by research, development, entrepreneurship and small businesses over the past two decades. ***The challenges noted below have impacted the social sectors as well; requiring innovative and entrepreneurial solutions to pressing issues.***

The table below highlights the challenges faced in the New Economy:

ATTRIBUTE	OLD INDUSTRIAL ECONOMY	NEW KNOWLEDGE ECONOMY
<b>Pace of Business</b>	Slow	Appreciably faster with rising customer expectations
<b>Business Development Approach</b>	Strategy pyramid: vision, mission, goals, action plans	Opportunity-driven, dynamic strategy
<b>Business Model</b>	Traditional: command-and-control	New business models: refocused on people, knowledge and coherence
<b>Success Measure</b>	Profit	Market capitalization (the market price of company)
<b>Organization of Production</b>	Mass production	Flexible, lean production and mass customization
<b>Key Drivers to Growth</b>	Capital	People, knowledge, capabilities
<b>Key Sources of Innovation</b>	Research	Research, systemic innovation, knowledge management, integration, partnering, new business creation, strategies and models
<b>Key Technology Drivers</b>	Automation and mechanization	Information and communication technology, e-business, computerized design and manufacturing
<b>Main Sources of Competitive Advantage</b>	Access to raw materials, cheap labor, and capital for conversion; cost reduction through economies of scale	Distinctive capabilities: institutional excellence, moving with speed; human resources, customer partnership; differentiation strategies; competitive strategies

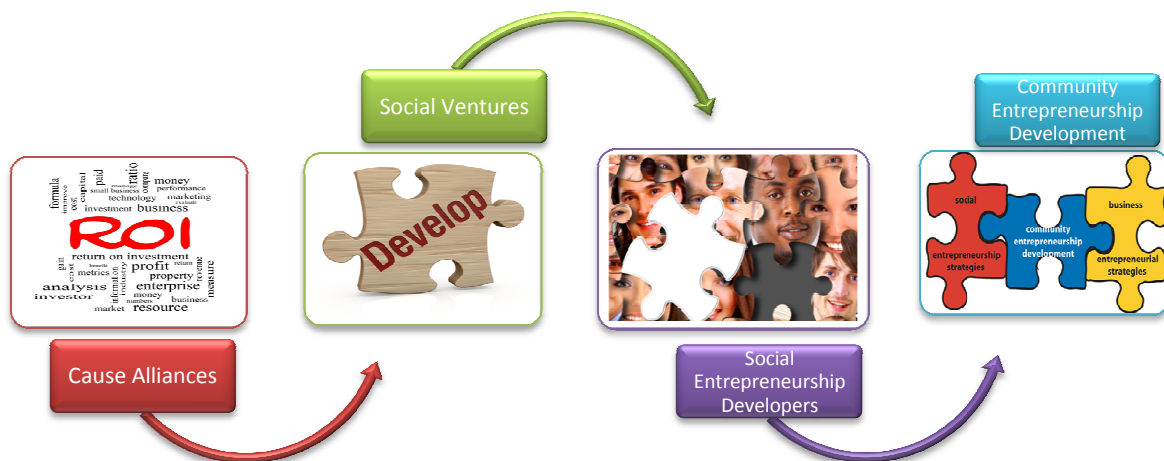


## Social Entrepreneurs – Create Sustainable Impact and Solutions

Social Entrepreneurs can be individuals, owners, businesses or organizations. Social Entrepreneurs are often people that are already successful in business or life and desire to share their passion and skills by finding a significant cause or area to invest in. For over 15 years, the Institute has helped solved complex problems using the concept of Social Entrepreneurship. We have implementing successful models and programs in each of the paths below

### Choosing a Path that is Right

- **Expand My Business’ Bottom Lines through Cause Alliances** - by partnering with great causes, combining the desire to incorporate their love for business into profit making sustainable ideas / change
- **Develop a Unique Social Venture** - Desire to launch a Social Entrepreneurial venture
- **Become a Social Entrepreneurship Developer** - Interested in putting their ideas into action to make communities a better place.
- **Community Entrepreneurship Development (CED)** – A community building model that addresses business and social needs using the power of Social Entrepreneurship that transforms entire neighborhoods and commercial areas.



### **The Institute’s Value Creation Process**

**Value Creation Process (VCP)** – the proven process the Institute uses to create winning ventures and initiatives (*See page 11 process overview*). The primary focus is on creating sustainable ventures or programs that address business and social needs. The Concept of Social Entrepreneurship goes beyond the confines of traditional community development and allows for entrepreneurship to be applied in:

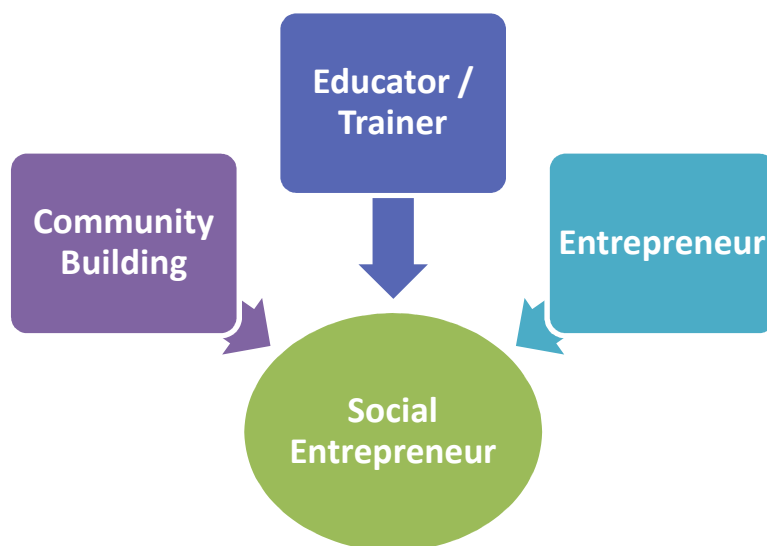
- Generating a greater profit by making more wealth and sustainable improvements to schools and communities
- Resolving pressing issues that prevent development and thriving communities
- Solving both business and social needs in a variety of settings, impact areas or applications



## The Social Entrepreneur's Mindset, Roles and Responsibilities

The Heart, Mindset & Skills of Social Entrepreneurs combines the:

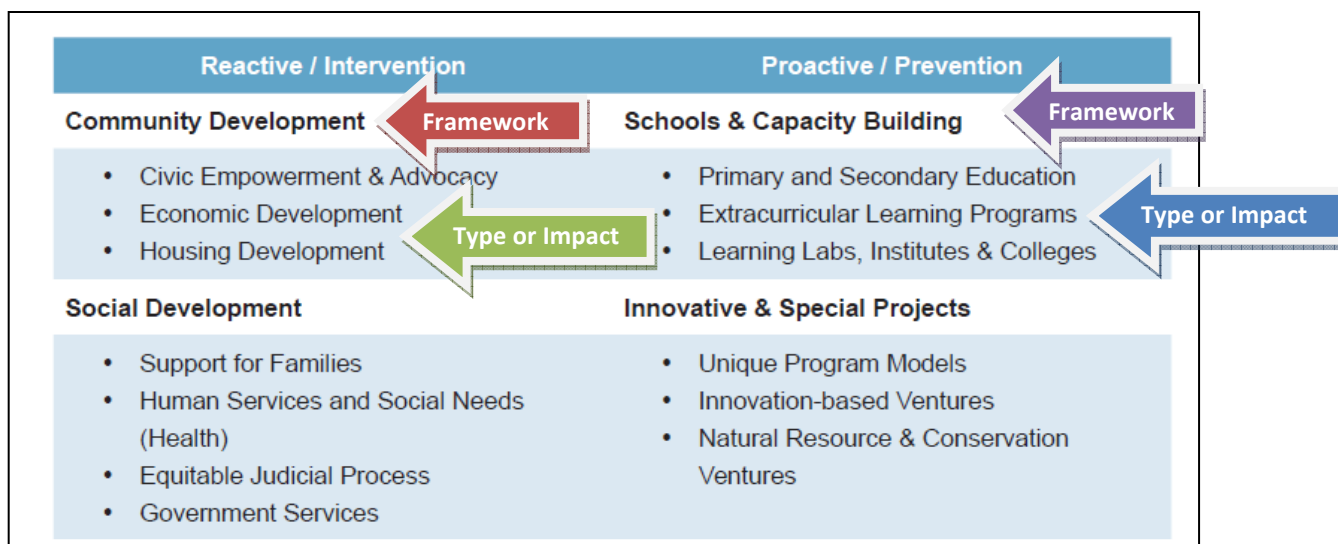
- **Community Building** - Individual or organization facilitates relationships, vision and goals
- **Educator and Trainer** – Share the knowledge and skills to ensure success. Show people the value of your products, services and the lenses of ownership
- **Entrepreneur(s)** – Manage and assumes the risk of a project, business or venture



## Social Entrepreneurial Projects and Ventures

The full power of Social Entrepreneurship is revealed when the individual frames below are combined into a community-building strategy as a comprehensive plan or neighborhood revitalization effort. The power of the model emphasizes how people (including students) can transform their entire areas/neighborhoods by using Social Entrepreneurship as a community-building model.

In order to help Social Entrepreneurs choose an area of impact, the Institute developed the framework below to help select an area of impact.



## Sustainable Solutions, Knowledge Sharing and Smart Teams

Social Entrepreneurs have the desire and commitment to utilize their skills and talents to launch a new business or social venture that makes money and addresses a complex problem in their organization, school or community.

Social Entrepreneurs are:

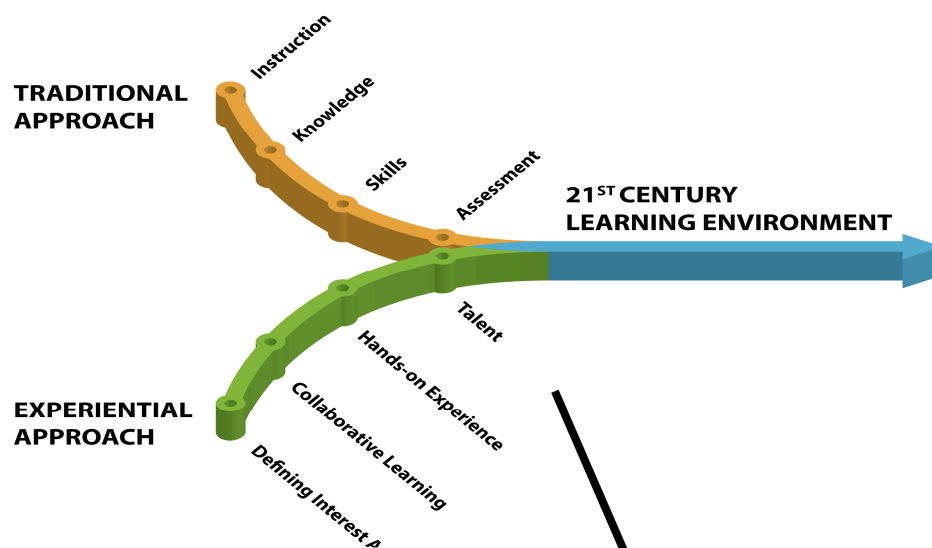
- Passionate and trained to address social and business needs. Projects often take Social Entrepreneurs to communities worldwide.
- Engaged in life changing missions that solve problems
- Highly trained individuals or teams who address complex social and business needs using entrepreneurship and non-conventional methods.



ISE helps **Entrepreneurs** and **Smart Organizations** leverage their skills and resources and expand their impact in the places they do business.

**We Help Smart Organizations:**

- ✚ Take Risks & Make Long-term Investments
- ✚ Focus on the Return on Investment and Sustainability
- ✚ Value All Components of the Value Creation Process
- ✚ Build Talent & Skill at All Levels
- ✚ Gain Buy-in / Ownership Level Commitment
- ✚ Invest in Community



The process of educating and training Social Entrepreneurs is paramount to success.

**The Institute has combined Traditional and Experiential learning approaches into the 21<sup>st</sup> Century Learning Environment.** The model engages and trains entrepreneurs and businesses to incorporate the concept of Social Entrepreneurship into their business or venture.

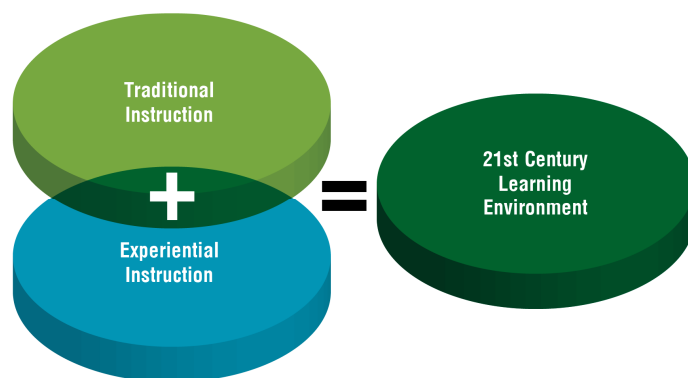
**Successful teams must have the right blend of Skill & Talent**

**The Journey** was designed to provide students with the education and experiences that will prepare them to be exceptional business people that also possess the skills necessary for the new economy and marketplace.

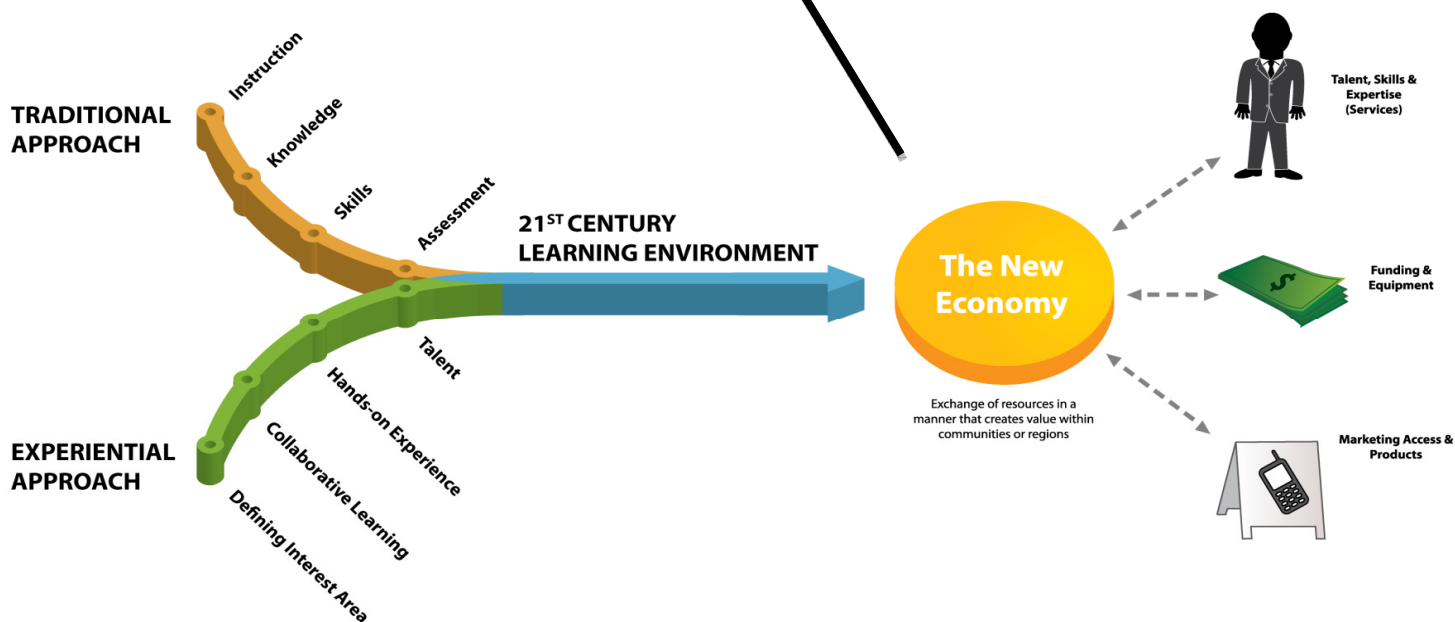
Social Entrepreneurship is a great means of directly linking traditional business methods with emerging models. The Social Entrepreneurial projects make learning engaging by showing individuals and groups (businesses & organizations) how to apply the concept to improve the performance of their business or venture.

### The Journey is designed for the New Economy & 21<sup>st</sup> Century Marketplaces:

- Contains a blend of traditional and experiential learning activities
- Increases student skill levels and overall business mindset
- Incorporates critical thinking exercises and teamwork skills
- Includes built-in business standards and success measures
- Improves communities and develops sustainable projects



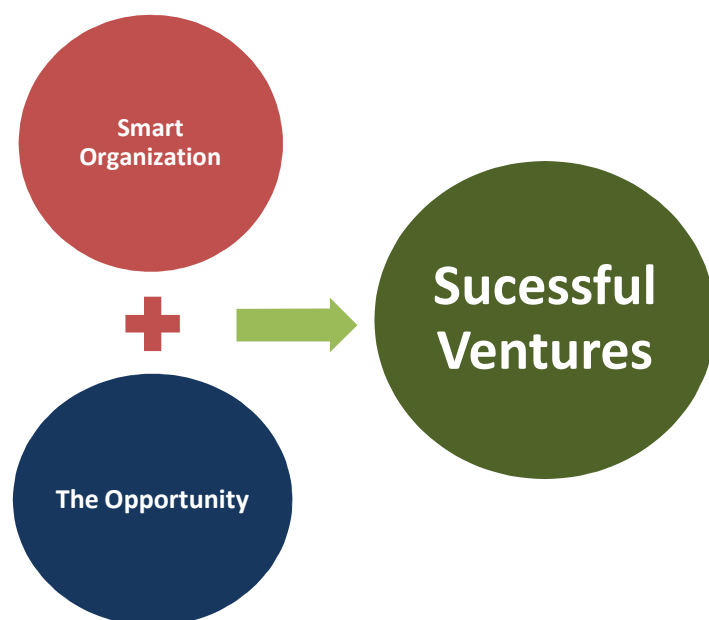
**This is the GOAL!**



## Social Entrepreneurship in Communities – Businesses, Social Ventures & Developers

Our community development model is designed to improve communities located in and around neighborhood and commercial areas. The process uses entrepreneurial approaches to address both: social and economic / business needs in communities.

### The power of the framework helps to:



✚ Increase the viability of commercial areas and attract desired businesses and investors to an area while encouraging local residents to own real estate and businesses

✚ Reduce social issues (crime, poverty, safety, lack of investment, jobs, etc.) by applying social entrepreneurship

✚ Provide comprehensive ongoing technical assistance and support to area businesses and ventures

✚ Improve the marketing and perception of commercial areas and the aesthetic appeal of the businesses and areas

✚ Develop attractions and destinations that customers are willing to visit (arts, neighborhood history and cultural events, festivals, exhibits, etc.)

**The Arnett - Before**



**The Arnett - After**



## Smart Designs

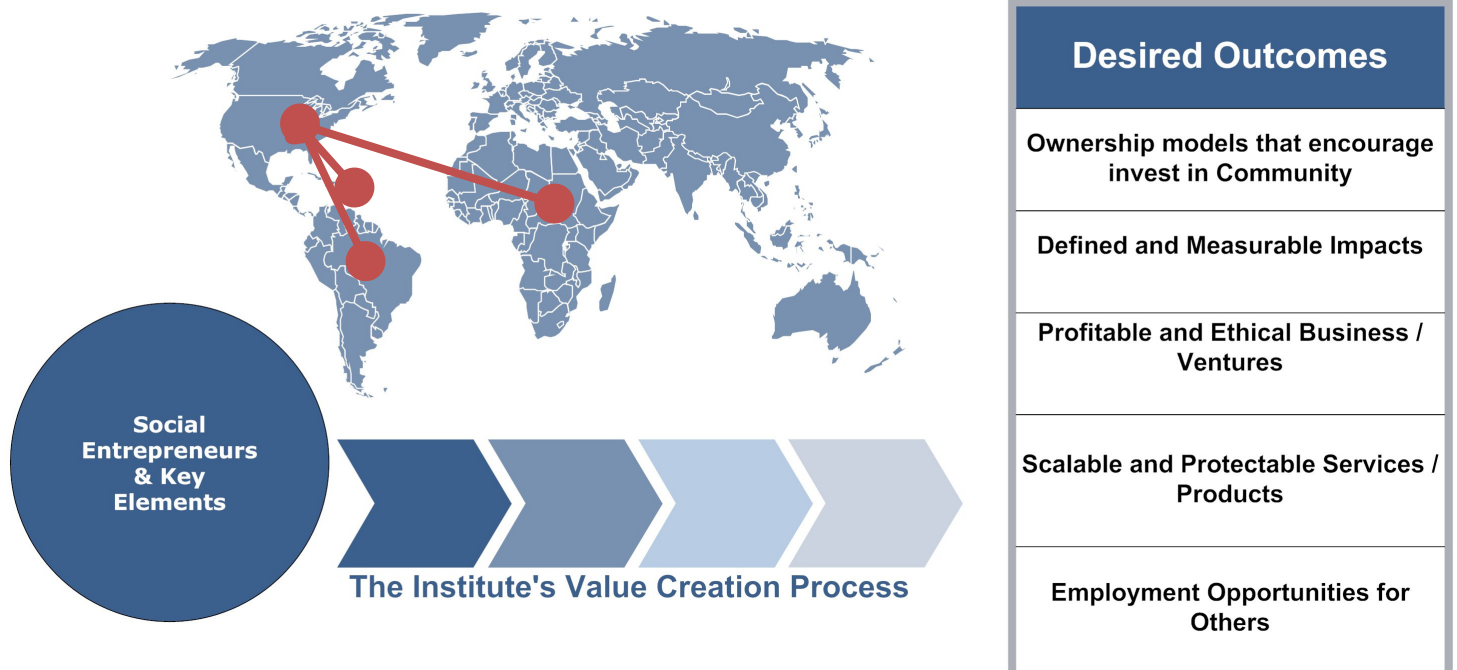
The Institute for Social Entrepreneurship helps clients to develop winning concepts and programs by following our Value Creation Process (VCP). Our VCP includes research, design and implementation of venture concepts that solve problems and make lasting impact,

***The following key elements, when combined with the Social Entrepreneur's passion and our winning process, produce positive results and desired outcomes!***

### Key Elements Found in Winning Ventures and Concepts:

- Focus on ownership models that encourage significant investments in community
- Defined geographical areas and measurable impact opportunities
- Winning venture concepts with several profit centers
- Emphasis on ethical business practices that ensure long-term scale and protection of ownership and access
- Sustainable ventures that expand employment opportunities over time

## Smart Designs



## Reasons Why Smart Organizations Consult with the Institute

Client Need	ISE Product / Service	Tangible / Measurable Results
<input type="checkbox"/> <b>New Business Focus / Expansion</b>	<ul style="list-style-type: none"> <li>• Ideation and Profit Model</li> <li>• Marketing Research, Plans and Strategies</li> <li>• Convene Entrepreneurial Teams</li> </ul>	<ul style="list-style-type: none"> <li>• Long-term Investments &amp; Market Share</li> <li>• Product / Service Ideas and New Sources of Income</li> </ul>
<input type="checkbox"/> <b>New Business or Social Ventures / Program Models</b> (Startups, Businesses and Social Ventures)	<ul style="list-style-type: none"> <li>• Develop Winning Venture Plans</li> <li>• Innovation-based &amp; Entrepreneurial Ventures</li> <li>• Customize Program and Knowledge Sharing Development</li> </ul>	<ul style="list-style-type: none"> <li>• Expanded Business or Venture</li> <li>• Cause Marketing</li> <li>• Entrepreneurial Projects and Programs</li> <li>• Unique Curriculum &amp; Program Designs</li> <li>• Investment in Community</li> </ul>
<input type="checkbox"/> <b>Expanded Sales and Customers</b>	<ul style="list-style-type: none"> <li>• Ideation and Profit Model</li> <li>• Value Creation &amp; Sustainability Process</li> </ul>	<ul style="list-style-type: none"> <li>• Greater Profitability, Return on Investment &amp; Sustainability</li> </ul>
<input type="checkbox"/> <b>Committed &amp; Skilled Staff / Partners</b>	<ul style="list-style-type: none"> <li>• Assess and Build Individual and Entrepreneurial Teams</li> <li>• Customize Training Development</li> </ul>	<ul style="list-style-type: none"> <li>• Talented &amp; Skilled Staff and Partners at All Levels</li> <li>• Buy-in and Ownership Level Commitment</li> </ul>



## The Institute Team Members & Qualifications

	<p><b>CEO, David Dey</b> is one of the nation's foremost experts in Social Entrepreneurship. As professor, consultant and author, with 20 years of experience as a community developer, he has built ISE's curriculum, materials and proven methodology to help businesses succeed in growing and giving back. With expertise in securing resources to launch, grow and manage business, David helps entrepreneurs develop and execute winning business concepts through interactive programs and workshops.</p>
	<p><b>CIO (Chief Impact Officer), Julie Kazmierski</b> has 30+ years experience in key roles as a successful entrepreneur, highly decorated sales career with expertise in customer service delivery, leadership development and organizational management. Julie specializes in strengthening businesses through coaching, training and recruitment. Applying insight in program design and development, sales and marketing, presenting and business consulting. Julie helps entrepreneurs build talent and hone their skills. She has a passion to help women-based ventures.</p>
	<p><b>Strategic Operations Officer, Ewart LeBlanc</b> has 32 years of technical and business experience addressing a broad array of strategic leadership, financial management, technology, operations, marketing, public relations, and business development issues for a Fortune 500 company. Ewart helps entrepreneurs and organizations develop effective and efficient business processes across their value chains.</p>

Team Core Qualifications	Description of Competency / Experience
<b>Social Entrepreneurship Expertise</b>	Over 15 years developing social entrepreneurial knowledge sharing, frameworks, proven models and winning ventures
<b>Community Development Experience</b>	Over 25 years of community development experience
<b>Corporate Strategy and Project Management</b>	<p>Over 30 Years of corporate experience in strategic planning, project management and process optimization including:</p> <ul style="list-style-type: none"> <li>• International manufacturing operations</li> <li>• Product delivery process models</li> <li>• Lean Six Sigma certification</li> </ul>
<b>Business, Venture Startups and Program Design</b>	ISE has helped over 30 start-up clients design businesses or ventures
<b>Business Consulting Experience</b> <ul style="list-style-type: none"> <li>• <b>Business Tool Services</b></li> <li>• <b>Knowledge Sharing Series</b></li> </ul>	40 clients have increased their profitability and success using ISE's consulting services

## Strategic Alliances and References

The Institute has collaborated with and assisted a number of businesses and social ventures. The chart below highlights a few partners and references that have benefitted from our winning combination of knowledge, capital, investment and support.

	Organization	Social Entrepreneurial Type	Contact Name & Title	Contact Information
<b>Institute for Social Entrepreneurship Partners</b>	<b>Human grid</b>	Cause Alliance & Business Venture	Maggie Rosenfeld CEO	Phone – 585-442-4110 Email - <a href="mailto:mrosenfeld@innovating.com">mrosenfeld@innovating.com</a>
	<b>Idea Connections</b>	Cause Alliance & Business Venture	Bob Rosenfeld CEO	Phone – 585-442-4110 Email - <a href="mailto:rosenfeld@innovating.com">rosenfeld@innovating.com</a>
	<b>Deaf Education and Arts for African Families (DEAAF)</b>	Social Venture	Lisa Zahra President	Email - <a href="mailto:lisainzambia@yahoo.com">lisainzambia@yahoo.com</a>
	<b>Empire of Good - EOG</b>	Social Venture	Ana Elisa Fermín Co-Owner	Cell – 585-613-5607 Email - <a href="mailto:ana@eogcooperative.com">ana@eogcooperative.com</a>
	<b>Empire of Good - EOG</b>	Social Venture	Josh Kashorek Co-Owner	Cell – 585-360-9372 Email - <a href="mailto:josh@eogcooperative.com">josh@eogcooperative.com</a>
	<b>Friends of Haiti</b>	Social Venture	Tom Pavone President	Cell – 585-746-4159 Email - <a href="mailto:tpavone14@gmail.com">tpavone14@gmail.com</a>
	<b>Kuumba Arts</b>	Social Venture	Delores Radney-Jackson Co-Owner	Cell – 585-355-8888 Email – <a href="mailto:deloresradney@hotmail.com">deloresradney@hotmail.com</a>
	<b>The Rock Foundation</b>	Social Venture	Lynn Catalano President and CEO	Cell – 585-415-4279 Email - <a href="mailto:LCStyle@Rochester.rr.com">LCStyle@Rochester.rr.com</a>



## Past, Present and Future

For 15 years the Institute developed solutions to complex problems for clients and communities. Our solutions include innovative and entrepreneurial approaches which have been conceptualized, tested and validated through the collision between Social Entrepreneurial Theory and Practice. We not only theorized the great ideas, we sought out the venues to implement models of Social Entrepreneurship.

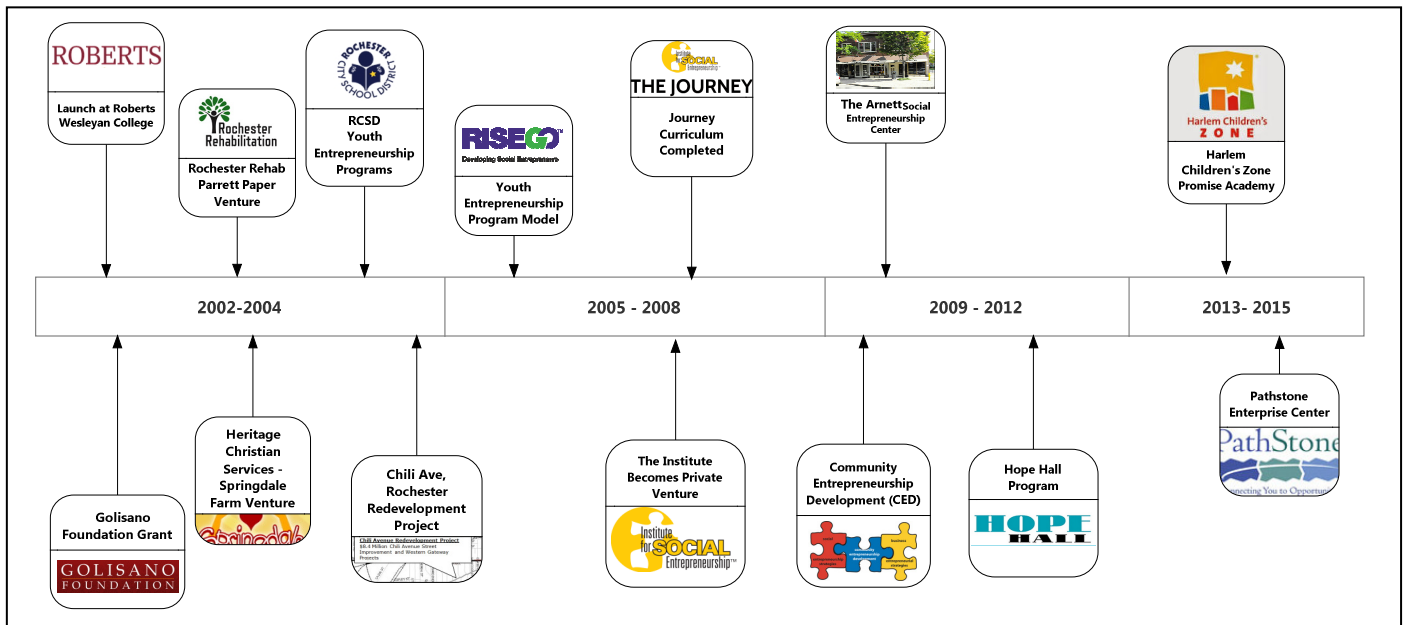


Timeline	Milestone Event / Featured Client Service or Project	Organization / Partner	Framework / Type
2002 - 2006	<b>Launch</b> the Institute for Social Entrepreneurship at Roberts Wesleyan College	<b>Roberts Wesleyan College</b>	Schools & Capacity Building
2002	<b>Secured</b> \$280,000 B. Golisano Foundation Grant	<b>Golisano Foundation</b>	N/A
2002 – 2003	<b>Parrett Paper Venture</b> <ul style="list-style-type: none"> <li>• Business Plan (Financial Forecasting)</li> <li>• Parret wins \$100,000 competition with winning plan.</li> </ul>	<b>Rochester Rehabilitation Center</b>	Social Ventures
2002 – 2004	<b>The Springdale Farm</b> <ul style="list-style-type: none"> <li>• Business and Marketing Plan</li> <li>• Business Plan is used to secure \$2.5 million loan, grants, farm expansion and sustainability.</li> </ul>	<b>Heritage Christian Services</b>	Social Ventures
2002 – 2004	<b>Younger Older Adults Service Needs –</b> <ul style="list-style-type: none"> <li>• Market Research</li> </ul> <b>Healthy Sisters’ Soup &amp; Bean Works</b> <ul style="list-style-type: none"> <li>• Marketing Plan and sales support</li> </ul>	<b>Catholic Family Center</b>	Social Ventures
2002 – 2006	<b>Global Media Arts High School</b> <ul style="list-style-type: none"> <li>• Youth entrepreneurship pilot program class for 11th graders.</li> </ul>	<b>Rochester City School District</b>	Schools & Capacity Building
2002 – 2003	<b>Chili Avenue Redevelopment Project</b> <ul style="list-style-type: none"> <li>• Completed marketing analysis and redevelopment report.</li> <li>• Demographic analysis of spending patterns based on data.</li> </ul>	<b>Interfaith Action</b>	Community Development

<b>2005 - 2015</b>	<b><u>RISEGO, Inc.</u></b> <ul style="list-style-type: none"> <li>Launched a not-for-profit dedicated to creating young social entrepreneurs in schools and communities.</li> </ul>	<b>RISEGO Inc.</b>	Schools & Capacity Building
<b>2006-2009</b>	<b>The Institute models Community Entrepreneurship Development (CED)</b> <ul style="list-style-type: none"> <li>An interrelated framework and process that utilizes Social Entrepreneurship as a community-building strategy.</li> </ul>	<b>Institute for Social Entrepreneurship</b>	All Frames and Types
<b>2006 - 2010</b>	<b>Development of "The Arnett"</b> <ul style="list-style-type: none"> <li>A Social Entrepreneurship Center model that trains youth to create businesses that build community.</li> <li>The Center contains a blend of youth and professional Social Entrepreneurs.</li> </ul>	<b>RISEGO &amp; Institute for Social Entrepreneurship</b>	Schools & Capacity Building / All Frames & Types
<b>2006</b>	<b>The Journey Curriculum is completed</b> <ul style="list-style-type: none"> <li>A comprehensive approach and teaching tools to train Social Entrepreneurs.</li> </ul>	<b>Institute for Social Entrepreneurship</b>	All Frames & Types
<b>2010 - 2013</b>	<b>Hope Hall Social Entrepreneurship, Career and Economic Courses</b> <ul style="list-style-type: none"> <li>The Journey and Social Entrepreneurship are a school model program for 9<sup>th</sup>– 12<sup>th</sup> graders.</li> </ul>	<b>Hope Hall</b>	Schools & Capacity Building
<b>2014</b>	<b>Harlem Children's Zone – Promise Academy</b> <ul style="list-style-type: none"> <li>Teacher instructed summer program to teach 6<sup>th</sup> graders Social Entrepreneurship using Journey curriculum.</li> </ul>	<b>Harlem Children's Zone</b>	Schools & Capacity Building
<b>2014</b>	<b>Small Business Training Workshop For New American Entrepreneurs -</b> <ul style="list-style-type: none"> <li>A customized training series to assist immigrants launch successful business ventures.</li> </ul>	<b>Pathstone Enterprise Center</b>	Innovative & Special Projects

## Timeline & Milestones

The timeline includes the ISE's milestone accomplishments, clients and partners that have benefitted from our expertise. Our Value Creation Process uses the collision of great theory and practice with the goal of generating a larger return on investment, better impact and sustainability.



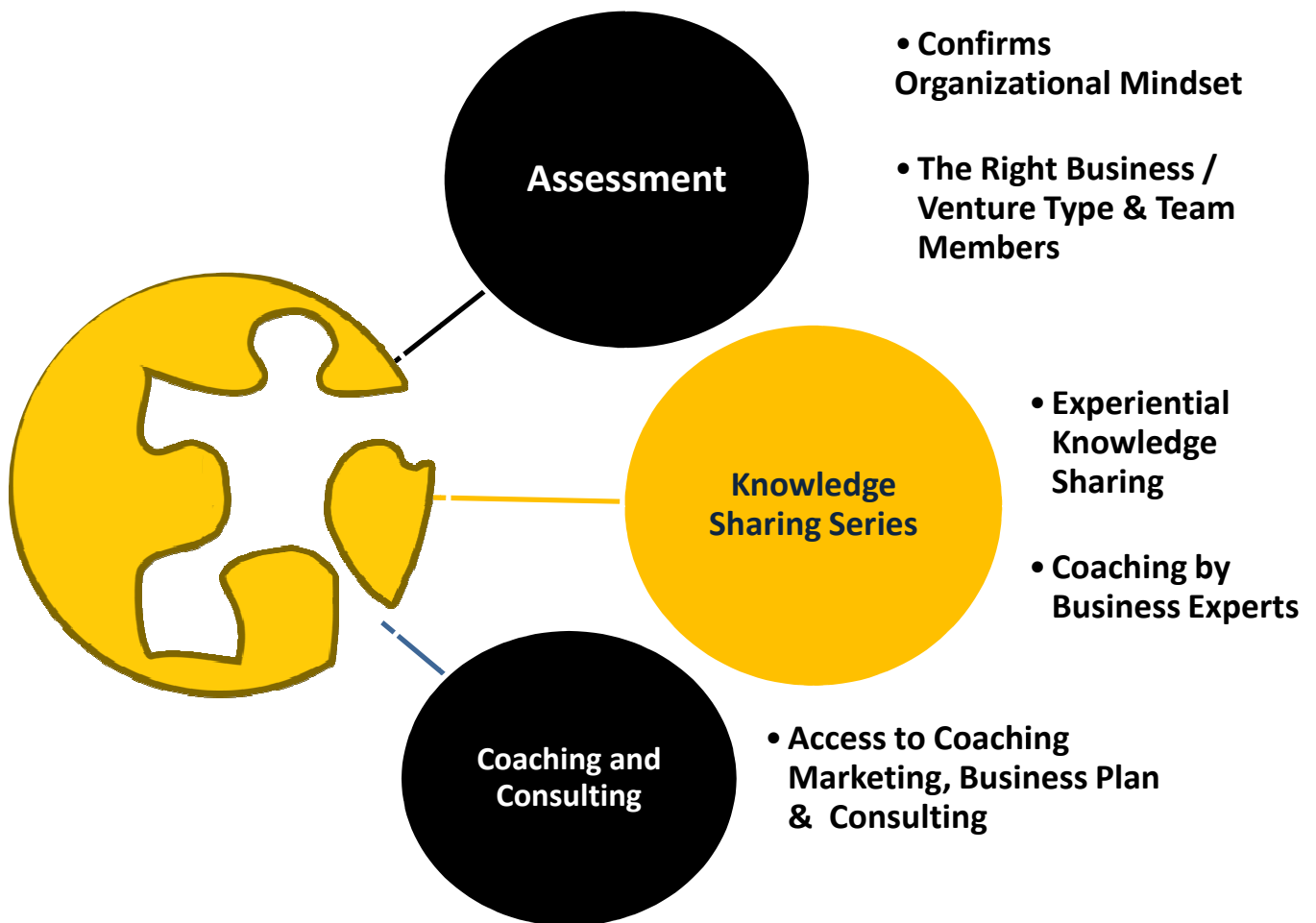
## Future Focus

The Institute will continue to assist smart organizations to increase their profitability, effectiveness, impact and sustainability. The goal is to share our Value Creation Process and success with developing communities in the US and abroad. This strategic focus allows communities to benefit from the ISE's innovative, entrepreneurial approaches and models. The communities will have access to:

- Online access to the Journey curriculum and **Knowledge Sharing Tools**
- **Train the Trainer Series** to enable individuals and teams to implement the CED model in their community
- Extend access to **Business Tools and Consulting**



## The Institute Services and Contact Information



## Contact Information

In addition to reviewing the attached profile, please visit our website - [www.institute4se.com](http://www.institute4se.com)  
 Please contact Julie Kazmierski, Chief Impact Officer, via cell at 585-414-6577 or email to [jkazmierski@institute4se.com](mailto:jkazmierski@institute4se.com) to set up a consultation.

### Institute for Social Entrepreneurship Contact Information:

Name:	Institute for Social Entrepreneurship
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